

americas · europe · africa · asia · australasia



BNI Connect[®] Training

Updated Chapter Features in BNI Connect[®] Tranche 2A

Rollout Date 12/12/2011

Version 1.0 – 12/10/2011

CHAPTER LEVEL EMAILS:

Emails can be sent to members, visitors, and potential visitors at the Chapter level by going to:

OPERATIONS > CHAPTER > CREATE EMAILS

The screenshot displays the BNI Connect interface. At the top, there is a 'Filter By:' section with three dropdown menus: 'Antarctica', 'Build One Region T', and '12345'. Below this is a navigation bar with 'Operations View Actions by:' followed by tabs for 'HQ', 'Country', 'Region', and 'Chapter'. The 'Chapter' tab is selected. The main content area is split into two columns. The left column contains a list of actions: 'Manage Visitor', 'Meeting Management', 'Manage Memberships', 'Manage Goals', 'Mentoring Program', and 'Create Email'. The 'Create Email' option is highlighted with a light blue background. The right column contains three options: 'Email My Chapter', 'Email Visitor Invitation', and 'Email Chapter Visitors'. The 'Email Visitor Invitation' option is highlighted with a light blue background.

Email My Chapter

This feature allows all the Chapter members to email one another. To access this feature go to:

OPERATIONS > CHAPTER > CREATE EMAIL > EMAIL MY CHAPTER

Filter By: Antarctica Build One Region T 12345

Operations View Actions by: HQ Country Region Chapter

Manage Visitor
Meeting Management
Manage Memberships
Manage Goals
Mentoring Program
Create Email

Email My Chapter
Email Visitor Invitation
Email Chapter Visitors

When the member selects the “Email Members”, they get a list of all the members’ email addresses returned to them that they can then cut and paste into their personal email client. Then they use their email client to send the email.

Please Note – All duplicate email addresses will be removed automatically.

Email My Chapter

Please copy and paste the list into your email client Duplicate email addresses have been removed from this list.

Gary Hull<random-3cf01594630f3aa530414dde128154a5@bnitester.com>; Stephen Hudson<random-da0e1b073a42e9d8a904eb1c914d2146@bnitester.com>; Phyllis Regula<random-97ae8a21f881660dd73db878232f76f8@bnitester.com>; Jim Akers<random-218f9cd4c2f00e097df354171680421c@bnitester.com>; Randall Smith<random-9037b9545af545b124a787526ef78557@bnitester.com>; Larry Earley<random-db640658be1d0889bfcfd4f33ba2f27c@bnitester.com>; Ralph Cigliano<random-f7fed6aa84ce101765be9b3a474ae027@bnitester.com>; Wendy Hughes<random-312ad2e064e3b67534d87da29936faa1@bnitester.com>; Alan Smith<random-5c4a6fb159eedc5113d1ae5c771b506a@bnitester.com>; Michael Simmons<random-d7dd7362f744f961530dcc7073c02b9@bnitester.com>; Scott Goldstein<random-f18d1f6a4dee70a892c75a3b6178cc89@bnitester.com>

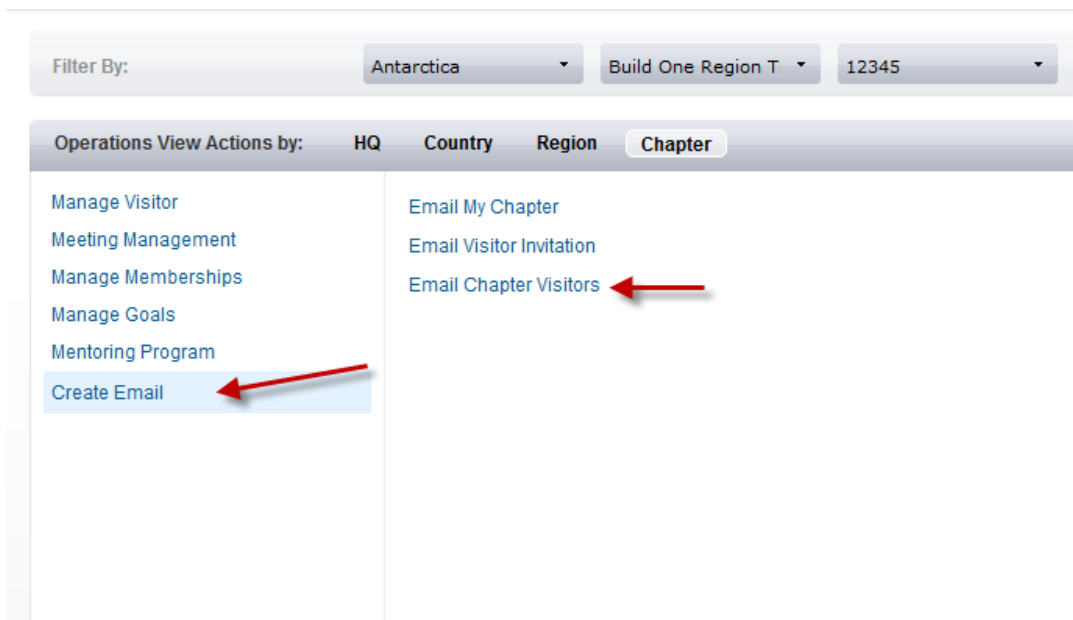
Email Visitors

Using this feature, chapters can now email all the past visitors. Based on search functions, you will be able to email the visitors based on the following criteria

- Date range of visits
- Primary Category
- Secondary Category

To access this feature go to:

OPERATIONS > CHAPTER > CREATE EMAILS > EMAIL VISITORS



This will bring them to a search feature where they can select the certain criteria to narrow their search for Visitors.

Region Name- FL Jacksonville Chapter Name-

Visitors entered date: AFTER	12/04/2011	BEFORE	12/11/2011
Primary Category (multi-select)	<ul style="list-style-type: none"> All Accounting Administrative Advertising Agricultural Animals Apparel Appearance 		
Secondary Category (multi-select)	<ul style="list-style-type: none"> All Accounting, Accounting Services Accounting, Bookkeeping Accounting, Certified Public Accountant Accounting, Enrolled Agent Accounting, Taxes Administrative, Administrative Services Administrative, Personal Assistant 		
		Reset	Next

Once they have determined the search criteria and hit the “Next” **Next** Button” They will receive a list of all the visitors’ email addresses returned to them that they can then cut and paste into their personal email client. Then they use their email client to send the email.

Please Note – All duplicate email addresses will be removed automatically.

Chapter Email Visitors ✕

Please copy and paste the list into your email client Duplicate email addresses have been removed from this list.

```
Lee Hilbert<random-600663e3529d5f7c662733a2bbfb94c8@bnitester.com>; Kris
Dods<random-bb23ff1520b0dfb73726260ff56a6df@bnitester.com>; Robert Giordano<random-
66c94ad76fb081beb22ed4db64595fb@bnitester.com>; Matt Rocco<random-
2e3736e743773531ea50dd32c8179c46@bnitester.com>; Kris Dods<random-
f3564d3056854b88a351adffef1c3b59@bnitester.com>; Rich Vecchio<random-
adb74d58860086e2b05f8085063a991e@bnitester.com>; Chris Sorrells<random-
a4ff3cd646a270972b3c2df13bd16fe7@bnitester.com>; Bob LoPresti<random-
2d29c34980da64f1b70a73411a281013@bnitester.com>; Robert Giordano<random-
66c94ad76fb081beb22ed4db64595fb@bnitester.com>; David Luck<random-
f6e355d6f499e5489aff206158d3f854@bnitester.com>; Lisa Michael<random-
3ed845f2229c7f120f2df673d1b78c13@bnitester.com>; Mike Klanderond<random-
b986ee4015c83a27b0d3bf05422dc5ce@bnitester.com>; PHyllis Regala<random-
d02c05a21a398a7cbc47c26f7c0a07eb@bnitester.com>; Scott Reinke<random-
596b0b52f39337c691fc45189de2f6d5@bnitester.com>; Tom Frohne<random-
9571b8f2090e456466fce982cf16f1c@bnitester.com>; Phyllis Regula<random-
cb8e7b9f9c10d0e60c15c41716df6d82@bnitester.com>; Sharon LaRosa<random-
6c96c36202c592516efdc83d48f3811b@bnitester.com>; Wendy Hughes<random-
312ad2e064e3b67534d87da29936faa1@bnitester.com>; Sharon LaRosa<random-
9e57c46e485b1a08b83dfb6f1577aa73@bnitester.com>; Tami Ricketts<random-
6f94544a1fd7a9ed1448a620f4b542e3@bnitester.com>; Leah Blake<random-
c6968a22abd4a96fc3de33dcd21084f4@bnitester.com>; Wendy Hughes<random-
a2720b8c49ce11761d30b04986f02620@bnitester.com>; Heather Thurston<random-
7c9e56dc269088f117bc36a9521831ae@bnitester.com>; Richard Hansen<random-
```

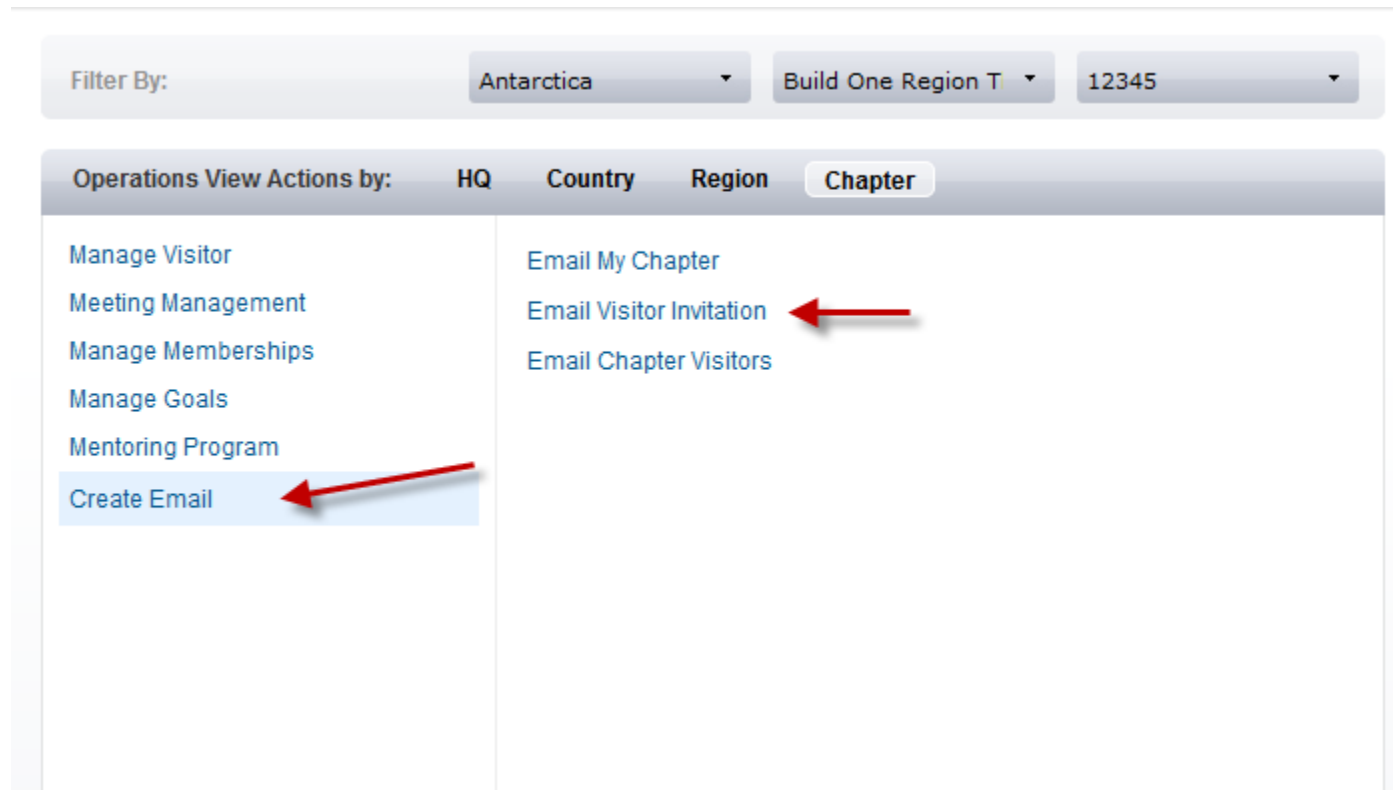
Email Visitor Invitation

This feature produces a branded invitation with the visitor invitation already installed. The Chapter members can also add a personal greeting in the first paragraph of the email.

Action Item – the “Visitor Invitation” email template must be uploaded prior to this feature working

To access the Visitor Invitation go to

OPERATIONS > CHAPTER > MASS EMAILS > EMAIL VISITOR INFORMATION



The screenshot shows the BNI Connect interface. At the top, there is a filter bar with three dropdown menus: "Filter By:" (set to "Antarctica"), "Build One Region T" (set to "12345"), and another dropdown. Below this is a navigation bar with tabs for "Operations View Actions by:" (HQ, Country, Region, Chapter). The "Chapter" tab is selected. On the left side, there is a list of actions: "Manage Visitor", "Meeting Management", "Manage Memberships", "Manage Goals", "Mentoring Program", and "Create Email". A red arrow points to "Create Email". On the right side, there is a list of actions: "Email My Chapter", "Email Visitor Invitation", and "Email Chapter Visitors". A red arrow points to "Email Visitor Invitation".

When the Email Visitor Invitation screen appears, it will ask for the following information:

1. Title of the Visitor (optional)
2. Visitor First Name (required)
3. Visitor Last Name (required)
4. Visitor Company Name (required)
5. Visitor Email Address (required)

There is also a space that the member can use for a personal message. This will appear at the beginning of the email message.

Enter Details

Title	Select Title ▼
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Visitor Company Name *	<input type="text"/>
Visitor Email Address *	<input type="text"/>
Personal Message	<div style="border: 1px solid #ccc; padding: 10px; background-color: #fff9c4;"><p style="text-align: center; color: #c00000;">Add a personal message to the invitee here</p></div>
<input type="button" value="Send"/> <input type="button" value="Cancel"/>	

When the invitation is ready to be sent, click the “Send” Button.

Helpful Hint

So that members can see what the invitation looks like, it is highly recommended that they send a test invitation to themselves prior to sending out any actual invitations.
